

Other service credit options include layoff (time spent away from work as a result of a formal layoff); prior service (time worked for an employer before its contract with CalPERS or before the contract included this option); and optional member service (time spent working in certain exempt, appointed, or elected positions).

Who's Eligible?

You CAN purchase service credit for layoff, prior service, or optional member service if:

- you are (or elect to become, if eligible) a CalPERS member.

You CANNOT purchase service credit if:

- your agency did not contract for this option; or
- you are retired

What's Required?

Layoff - Time spent away from work as a result of a formal layoff action

- you must be an active or inactive CalPERS member;
- you must have been laid off from a CalPERS-covered public agency employer with this option in its contract;
- you must have been a *full-time* employee prior to being laid off;
- the layoff period must have been *on or after* January 1, 1981;
- you must have returned to full-time CalPERS-covered employment with the layoff employer within 12 months of being laid off;
- you must currently be active with the layoff employer;
- you must elect to purchase this service within three years of returning to work or within three years of the effective date your employer adds this option to its contract;
- you must redeposit any contributions you withdrew during the layoff, plus interest; and
- you may purchase a maximum of one year for each layoff period.

Prior Service - Time worked for an employer before its contract with CalPERS (or before the contract included this option)

- you must be an active or inactive CalPERS member;
- there is no maximum amount of time for which you can receive credit; and
- if you worked for a CalPERS-covered employer:
 - the agency must have contracted for this option; and
 - limitations/restrictions vary by agency (some agencies may require that you be employed on the effective date of the contract). Check with your Personnel Office.

Optional Member Service – Time spent working in certain exempt, appointed, or elected positions that allow employees the *option* of joining CalPERS

- you must be an optional member on the date you request your cost information, and you must elect CalPERS membership at the same time. (Note: If you *formerly* held an optional position and are now a CalPERS member, you can also purchase your former service. See the **Service Prior to Membership** tab for instructions); and
- there are no limitations on the amount of time that can be purchased.

The following employees are considered optional members:

- a State employee who was appointed by the Governor, Lieutenant Governor, Attorney General, Controller, Secretary of State, Treasurer, or Superintendent of Public Instruction and is exempt from civil service;
- some officials elected or appointed to a fixed term of office with a city or county (this may include city attorneys and elected/appointed officials of schools and contracting agencies; eligibility is determined by the dates of your term of office); or
- an employee of the California State Senate or Assembly whose wages are paid from funds controlled by either body.

What's the Cost?**Layoff**

You must pay the contributions due, plus interest, for the period you were laid off. The cost is based on your payrate and contribution rate on the date you returned to employment. Interest is calculated from the date you return through the date you make the purchase.

Prior Service

This benefit depends on the specific terms of your employer's contract with CalPERS. Depending on the contract, you *could* be:

- credited at no cost with *all* of the service credit you would have earned;
- credited at no cost with *some* of the service credit you would have earned, and be given the option to purchase the rest, based on your payrate and contribution rate on the date you became a member (after the service was rendered), plus interest; or

- given the option to purchase *all* of the service credit you would have earned, based on your payrate and contribution rate on the date you became a member (after the service was rendered), plus interest.

Optional Member Service

The cost calculation is based on your payrate and contribution rate on the date you became a member (after the service was rendered), plus interest.

What's Next?

Gather your employment history information for the period just before your layoff or during your prior or optional member service. Fill out Section A of the form according to the steps for requesting service credit cost information. Then have the appropriate employer fill out Section B.

For Layoffs Only

Have your public agency employer fill out Section B of the election form and certify that the information is correct.

Steps for Requesting Service Credit Cost Information**Step 1****Complete Section A of the request form.**

If we have provided cost information to you in the past for this type of service credit purchase, check the "Yes" box and indicate the date your request was submitted. If you have submitted a retirement application, check the "Yes" box and indicate your planned retirement date.

Part 1 Complete your current mailing information.

Part 2 List your employment information.

Part 3 Sign and date the request form.

Step 2

Give the form to the agency where you were employed at the time of your layoff, prior service, or optional member service to complete Section B. When you receive it back, continue to Step 3.

Step 3

Submit the completed request form.

- Make a copy for your records.
- Mail the original to the CalPERS address listed on the form.



Request for Service Credit Cost Information Layoff, Prior Service, or Optional Member Service

Telecommunications Device for the Deaf: (916) 795-3240 • (888) CalPERS (225-7377)

Section 1

Information About You

Have you requested this cost information before? ☐ No ☐ Yes, date requested _____
Date (mm/dd/yyyy)

Have you submitted a retirement application? ☐ No ☐ Yes, retirement date is _____
Date (mm/dd/yyyy)

Name Social Security Number

Former Name (if applicable) Current Employer

Address

City State ZIP Daytime Phone

Section 2

Employment Information

List information about your employer at the time of your layoff, prior service, or optional member service.

Employment From (mm/dd/yyyy) Employment To (mm/dd/yyyy) Employer

Employment From (mm/dd/yyyy) Employment To (mm/dd/yyyy) Employer

Employment From (mm/dd/yyyy) Employment To (mm/dd/yyyy) Employer

Employment From (mm/dd/yyyy) Employment To (mm/dd/yyyy) Employer

Section 3

Certification

STOP. Forward this form to your employer at the time of your layoff, prior service, or optional member service for completion of Sections 4, 5 and 6 before returning to CalPERS.

I hereby certify that the above information is true and correct.

Member Signature

Name Social Security Number

Member Name

Social Security Number

Section 4

This section is to be completed by the agency that employed the member during the period listed on page 1 of 2. For **Layoff**, list the dates the member was laid off work.

For **Prior Service**, complete the detailed history for the employment dates and time worked. Remember, to be eligible, the employment period must be prior to your CalPERS contract date.

For **Optional Member Service**, complete the questions regarding the optional period, as well as the detailed history.

Employer Certification (to be completed by former employer)

Member Layoff History

Date From (mm/dd/yyyy)

Date To (mm/dd/yyyy)

Member Prior Service History

Did your agency have a local retirement system (prior to CalPERS contract)? ☐ No ☐ Yes

Was this member a participant of the local retirement system? ☐ No ☐ Yes

Did the member withdraw these funds? ☐ No ☐ Yes

Service Time

Amount Withdrawn

Withdrawal Date

Optional Member Service

Was this position filled by an election or appointment to a fixed term of office? ☐ Election ☐ Appointment

Position Title

Was compensation paid considered a salary? (Expense reimbursement is not a salary) ☐ No ☐ Yes

Section 5

Be sure to include employment dates, pay rate, time worked, and earnings for the optional period.

Member Employment History

Employment From (mm/dd/yyyy)	Employment To (mm/dd/yyyy)	Time Worked (hour/days)	Earnings
Employment From (mm/dd/yyyy)	Employment To (mm/dd/yyyy)	Time Worked (hour/days)	Earnings
Employment From (mm/dd/yyyy)	Employment To (mm/dd/yyyy)	Time Worked (hour/days)	Earnings
Employment From (mm/dd/yyyy)	Employment To (mm/dd/yyyy)	Time Worked (hour/days)	Earnings
Employment From (mm/dd/yyyy)	Employment To (mm/dd/yyyy)	Time Worked (hour/days)	Earnings
Employment From (mm/dd/yyyy)	Employment To (mm/dd/yyyy)	Time Worked (hour/days)	Earnings

Section 6

If the service was performed for the State of California or California State University, employer certification is not required.

Statement and Signature of Authorized Employer Representative

I hereby certify that the above information is true and correct.

Employer Signature

Title

Date (mm/dd/yyyy)

Printed Name

Phone

FAX

Employer: Please return the completed form to the member.

Mail to:

CalPERS Member Services Division • P.O. Box 4000, Sacramento, California 95812-4000